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OFFICE OF STATE CONTROLLER  
PERSONNEL/PAYROLL SERVICES DIVISION  
300 Capitol Mall  
P.O. Box 942850  
Sacramento, CA 94250-5878

DATE: January 27, 2000

PERSONNEL LETTER #00-002  
CIVIL SERVICE ONLY

TO: All Campuses in the Uniform State Payroll System

FROM: RALPH ZENTNER, Chief  
Personnel/Payroll Operations Bureau

RE: SCO TRAINING CATALOG FOR THE SPRING 2000 SEMESTER

The purpose of this memo is to provide the latest information regarding the State Controller's Office, Personnel/Payroll Services Division training classes for April - June, 2000. PLEASE NOTE, ALL TRAINING ANNOUNCEMENTS ARE MADE VIA OFFICEVISION. WE DO NOT PRODUCE A HARD COPY TRAINING CATALOG.

#### TRAINING ENROLLMENT

On Monday, January 31, 2000, Decentralized OfficeVision users will receive an on-line Needs Assessment form for the Spring 2000 semester. The training coordinator from each agency should fill in the necessary information on the Needs Assessment form and return the form to the Training Administrator via E-Mail to CO1 (pdenroll) or FAX to (916) 322-8137 (CALNET 492-8137) no later than Thursday, February 3, 2000. On or before Thursday, February 10, 2000, the Spring 2000 training schedule will be sent to all Decentralized OfficeVision users. On Tuesday, February 15, 2000, the Training Administrator will begin to contact each training coordinator in the order the Needs Assessment forms were received. NO PHONE CALLS WILL BE ACCEPTED IN LIEU OF THIS PROCEDURE.

In selecting a location for training, please indicate the nearest city, which you know your department will provide travel funds and which you are sure your staff will be able to attend. If there are no cities that meet this criteria, refer to the "CONSULTATIONS/SPECIAL REQUESTS" section of this letter, page 3.

We will make every effort to place trainees into the programs and dates requested. However, if placement is not possible at that time, the Training Administrator will offer other alternatives, dates or suggest direct contact with the appropriate instructor to discuss on-site consultations or a special request training program.

Our objective is to respond to department training needs within our resource capability.

#### CONFIRMATION OF ENROLLMENT:

Each scheduled trainee will receive a letter approximately 30 days prior to the class date. This letter contains important enrollment information including class dates, times and location.

#### CANCELLATION REQUIREMENTS:

To cancel an enrolled employee, contact the Training Services and Security Section at (916) 322-1245 (CALNET 492-1245), E-Mail at CO1 (pdenroll) or the California Relay Service at 1-800-735-2922 (TDD) NO LATER THAN TWO WEEKS BEFORE THE CLASS. It is important that the "two weeks before" guideline be followed so that others have an opportunity to enroll in the vacated spot.

#### ENROLLMENT SUBSTITUTIONS:

Substitutions will be accepted provided the substituting enrollee meets the prerequisites set for the program.

#### COURSE PREREQUISITES:

Prerequisites help to ensure each participant succeeds in comprehending the subject matter presented in class. PREREQUISITES MAY BE WAIVED ONLY WITH THE CONSENT OF THE INSTRUCTOR PRIOR TO THE CLASS DATE. PARTICIPANTS WHO DO NOT MEET THE PREREQUISITES AND HAVE NOT OBTAINED A WAIVER FROM THE INSTRUCTOR WILL BE SENT BACK TO THEIR OFFICE.

#### CONSULTATIONS/SPECIAL REQUESTS

To request consultations/special requests, contact the appropriate instructor listed with the course descriptions or Joan Collins, the Training Administrator, at (916) 322-1245 (CALNET 492-1245) or the California Relay Service at 1-800-735-2922 (TDD).

#### COURSE DESCRIPTIONS AND PREREQUISITES

Please note that our training program information is listed alphabetically by program name followed by the level (e.g., Advanced Salary Determinations class is listed as "Salary Determinations, Advanced"). The course descriptions are listed followed by the course prerequisites.

## CORRECTIVE ACTIONS (2 Days)

Doris Meekins, Instructor

(916) 324-7274 (CALNET 454-7274)

E-Mail: [dmeekins@sco.ca.gov](mailto:dmeekins@sco.ca.gov) or the California Relay Service at 1-800-735-2922 (TDD).

This course is a must for personnel staff who need instructions in properly documenting Corrective Actions and out-of-sequence (O/S) PAR transactions. Participants will be provided a step-by-step method of Reconstructing Employment History (EH) for O/S transactions.

Corrective Actions provides in-depth coverage of PAM Section 9 in the following areas:

- ◆ Corrects
- ◆ Voids
- ◆ Voids/Re-Enters
- ◆ Reconstructing EH

### PREREQUISITES:

Responsible for preparing a wide variety of PAR transactions. **MUST** have completed PAR DOCUMENTATION course at least TWO months prior to the Corrective Actions class date AND have at least four months Civil Service personnel/payroll experience. **THESE REQUIREMENTS ARE MANDATORY. ADMITTANCE TO ATTEND THIS PROGRAM WILL BE DENIED IF THE PREREQUISITES HAVE NOT BEEN MET.**

## FUNDAMENTALS OF PAYROLL (3 Days)

Blanca Hoffmann, Instructor

(916) 324-7261 (CALNET 454-7261)

E-Mail: [bhoffmann@sco.ca.gov](mailto:bhoffmann@sco.ca.gov) or the California Relay Service at 1-800-735-2922 (TDD).

This course provides information necessary to correctly and confidently document basic payroll transactions in today's personnel office. The class outlines appropriate procedures, processes and regulations governing a variety of payroll functions including completion of forms: STD. 672, Time and Attendance, for both negative and positive employees; STD. 603, Report of Absences without Pay; STD. 666, Report of Exceptions to the Payroll; STD. 674, Payroll Adjustment Notice; STD. CD38, Payroll Warrant Register and STD. 671, Miscellaneous Payroll/Leave Actions. Participants will learn how to reconcile Master Payroll, use the Master Payroll Certification system, work suspended payments and suspended transaction listings. They will also receive an overview of the Direct Deposit program and the accounts receivable process. This course emphasizes the important cutoff dates and the consequences when transactions are not processed on or before to those dates. Participants learn and acquire processing skills through a variety of practical exercises and group problem solving activities.

## PREREQUISITES:

Must have at least four months Civil Service personnel/payroll experience and processed at least one master payroll reconciliation that included exceptions to the payroll.

## FUNDAMENTALS OF PERSONNEL (3 Days)

Elizabeth Edwards, Instructor

(916) 322-7974 (CALNET 492-7974)

E-Mail: eedwards@sco.ca.gov or the California Relay Service at 1-800-735-2922 (TDD).

This course is designed for employees new to the personnel field. Participants will learn how to process appointments and separations through the use of laws, rules, government codes and other regulations. They will also learn to ascertain the difference between permissive and mandatory actions on personnel issues and to compute state service, anniversary dates and probationary periods. The program also provides information on terminology, control agencies information and reference materials used in personnel. The information in this course is essential for accurately completing specific items in documenting PAR transactions.

## PREREQUISITE:

Must have one month of Civil Service personnel experience prior to attending this course.

## GARNISHMENT DOCUMENTATION (1 Day)

Blanca Hoffmann, Instructor

(916) 324-7261 (CALNET 454-7261)

E-Mail: bhoffmann@sco.ca.gov or the California Relay Service at 1-800-735-2922 (TDD).

This course provides instruction on appropriate documentation methods used to correctly process all types of garnishments. This includes legal requirements placed on departments by the courts, Internal Revenue Service and the Franchise Tax Board. On-going support garnishments, ordinary money judgements, earnings withholding orders for support, arrearages, federal and state tax levies and student loan defaults are also explained. In addition, garnishment warrant redeposits, multiple garnishments and bankruptcies are discussed. Participants learn the essential elements for Garnishment Documentation through practical exercises, examples and by using the Payroll Procedures Manual (PPM).

## PREREQUISITES:

Responsible for completing garnishment documentation, have at least six months Civil Service personnel/payroll documentation experience or completion of the Fundamentals of Payroll course.

## NON-INDUSTRIAL DISABILITY INSURANCE (NDI) PROGRAM (2 Days)

Lynda Jones-Wark, Instructor

(916) 324-7203 (CALNET 454-7203)

E-Mail: [ljones@sco.ca.gov](mailto:ljones@sco.ca.gov) or the California Relay Service at 1-800-735-2922 (TDD).

This course provides a complete overview of the NDI benefit program including laws, rules, regulations, policies and procedures. Also covered are the Employment Development Department (EDD) claim process, collective bargaining considerations and personnel/payroll documentation requirements. The course examines the different NDI benefits and calculation methods used for computing regular NDI benefits and annual leave benefits. Worksheets are provided to assist in annual leave NDI computations. Practical exercises include PARs; form STD. 674D, Industrial/Non-Industrial Disability Pay/Adjustment Request; form STD. 671, Miscellaneous Payroll/Leave Request; EDD claim forms and annual leave calculations.

### PREREQUISITES:

RESPONSIBLE FOR COMPLETING NDI TRANSACTIONS, have at least four months Civil Service personnel/payroll experience and either the completion of the PAR DOCUMENTATION course or at least four months documenting PARs.

## PAR DOCUMENTATION (2 Days)

Doris Meekins, Instructor

(916) 324-7274 (CALNET 454-7274)

E-Mail: [dmeekins@sco.ca.gov](mailto:dmeekins@sco.ca.gov) or the California Relay Service at 1-800-735-2922 (TDD).

For those new to the personnel field, this course provides an introduction to the Personnel Action Manual (PAM). The primary emphasis focuses on the organization and use of the PAM. Participants receive a complete review of the PAM; completion of the six employment history documents; PAR Item definitions; and the selection and use of the appropriate transactions charts. Practical exercises enable participants to become familiar with the PAM and completion of personnel documentation.

### PREREQUISITES:

Currently responsible for documenting PAR transactions, AND have AT LEAST TWO MONTHS EXPERIENCE DOCUMENTING PARs.

PLEASE NOTE: This class is a MANDATORY prerequisite for the Corrective Actions course.

### PAYROLL INPUT PROCESS (1 Day)

Blanca Hoffmann, Instructor

(916) 324-7261 (CALNET 454-7261)

E-Mail: [bhoffmann@sco.ca.gov](mailto:bhoffmann@sco.ca.gov) or the California Relay Service at 1-800-735-2922 (TDD).

Payroll Input Process (PIP) is a class designed for new personnel staff who process pay transactions; i.e., overtime, positive pay and miscellaneous payments. Participants will be provided a program overview of the PIP application and keying experience for the three PIP screens: TA - Time and Attendance; MIS - Miscellaneous; DCK - DOCK. Instructions for the available commands and Inquiry screens will also be presented.

#### PREREQUISITES:

A minimum of two months at the PSS1 level and at least two key entry experiences on the PIP system.

### SALARY DETERMINATIONS, ADVANCED (2 Days)

Elizabeth Edwards, Instructor

(916) 322-7974 (CALNET 492-7974)

E-Mail: [eedwards@sco.ca.gov](mailto:eedwards@sco.ca.gov) or the California Relay Service at 1-800-735-2922 (TDD).

This course is designed for those who frequently use the salary rules and regulations. This program gives practical experience in determining the correct salary rate in a variety of deep class movements. There is special emphasis on discretionary movements between deep classes, the Personnel Management Policy/Procedures Manual Section 315 and consecutive transfers. Laws, rules, DPA and SPB memoranda regarding deep class movement are discussed.

#### PREREQUISITES:

Must have completed the INTRODUCTION TO SALARY DETERMINATIONS course and have active involvement on a regular basis in the completion of salary determinations. **THIS REQUIREMENT IS MANDATORY. ADMITTANCE TO ATTEND THIS PROGRAM WILL BE DENIED IF THE PREREQUISITE HAS NOT BEEN MET.**

## **SALARY DETERMINATIONS, INTRODUCTION TO (2 Days)**

Elizabeth Edwards, Instructor

(916) 322-7974 (CALNET 492-7974)

E-Mail: eedwards@sco.ca.gov or the California Relay Service at 1-800-735-2922 (TDD).

### **Supervisors/Training Coordinators, PLEASE NOTE:**

While this class is an introductory class, it is NOT for staff new to the personnel transactions field. It is designed for staff with a familiarity with and a working knowledge of personnel transactions. Prior to enrolling staff, please refer to course prerequisites, shown below, for the minimum number of required months of personnel experience.

This course provides the essential steps to correctly compute salary rates on new appointments, promotions, transfers and demotions. The primary focus is upon the laws and rules pertaining to salaries and anniversaries, as well as the formulas used to determine the appropriate salary rule. Additionally, participants learn to apply information contained in the Civil Service Pay Scales and the rules and policies used to determine accurate salary rates and anniversary dates. Participants will gain a working knowledge of methods used to determine salary rates and anniversary dates with the use of practical exercises for new appointments, movement between alternate ranges and movement between non-deep classifications.

### **PREREQUISITES:**

Must be responsible for determining salaries, have six months personnel experience and have completed the FUNDAMENTALS OF PERSONNEL course.

**PLEASE NOTE: THIS COURSE IS A MANDATORY PREREQUISITE FOR THE ADVANCED SALARY DETERMINATIONS COURSE.**

## **WORKERS' COMPENSATION: THE BEGINNING STEPS (1-Day)**

Lynda Jones-Wark, Instructor

(916) 324-7203 (CALNET 454-7203)

E-Mail: ljones@sco.ca.gov or the California Relay Service at 1-800-735-2922 (TDD).

This course provides valuable information to those in personnel who are directly responsible for providing Workers' Compensation guidance to line supervisors, managers and/or employees. In-depth discussions include explaining Workers' Compensation benefits, eligibility requirements and the initial forms to be completed for injured employees. State Compensation Insurance Fund's (SCIF) role and responsibilities and the completion of various SCIF forms and form STD. 618S, Employee Benefit Options, are included. Participants will also learn each area of responsibility for the injured employee, the line supervisor and the personnel office.

**PREREQUISITE:**

**HAVE AT LEAST SIX MONTHS CIVIL SERVICE PERSONNEL/PAYROLL DOCUMENTATION EXPERIENCE.**

**PLEASE NOTE: THIS CLASS IS A MANDATORY PREREQUISITE FOR THE WORKERS' COMPENSATION DOCUMENTATION COURSE.**

**WORKERS' COMPENSATION DOCUMENTATION (3 Days)**

Lynda Jones-Wark, Instructor

(916) 324-7203 (CALNET 454-7203)

E-Mail: [ljones@sco.ca.gov](mailto:ljones@sco.ca.gov) or the California Relay Service at 1-800-735-2922 (TDD).

This course provides participants with current information regarding Industrial Disability Leave (IDL) including Enhanced IDL, IDL with Supplementation and Temporary Disability (TD). Participants learn to use a variety of reference materials to become familiar with the laws and rules governing Workers' Compensation. Participants research, discuss and apply regulations through networking, group problem solving and independent study. Practical exercises include how to document personnel/payroll records for several disability cases. Added course features are written instructions and samples for abatements and SCIF payments calculated on the wage loss concept.

**PREREQUISITES:**

Must have either completed THE PAR DOCUMENTATION course or have six months Civil Service payroll experience documenting PARs. **MUST HAVE COMPLETED THE WORKERS' COMPENSATION: THE BEGINNING STEPS CLASS.** The enrollee should also be responsible for completing Workers' Compensation transactions.

**RZ: TSSS**